



Article Number:

Issue: Key & Authorize a Tow Invoice

Resolution:

1. Click on the **[Related]** tab.
 - a. Scroll to “Documents” to verify we have Tow receipt.
 - b. If no Tow receipt, refer to the [Retrieving Contract Records 20230104.pdf](#) SOP.
2. Click on the **[Actions]** tab.
 - a. Click **[Vehicle]**
 - b. Click on **[Add/Modify Claim Item]**.
 - c. Click the **[Lock]** to lock the claim.
 - d. Click **[Add Another Repair]**.
 - e. Click on the drop-down arrow next to “**New Repair Item**”.
 - f. You will need to fill out the required areas:
 - i. Coverage Group, input Road Service
 - ii. Coverage Type, input Tow
 - iii. Payable Type, input Service Contract
 - iv. Payee Type, input Customer
 - v. Covered Decision, input Authorize.
 - g. In the Service section, enter:
 - i. 1 for the quantity
 - ii. Dollar amount for total tow reimbursement for vendor rate, AAS rate, and authorized rate.
 - a. Vendor rate is total amount on the supplied invoice.
 - b. The AAS rate is the amount of invoice not to exceed the per occurrence tow reimbursement rate from contract.
 - i. Validate per occurrence rate using the CH policy terms.
 - iii. Tax will always be 0.
 - h. Click **[Save]**.
3. Send claim number to your Team Lead via Microsoft Teams for Authorization.
4. Once authorized, you will “Task” payments to release reimbursement. Refer to “How to Assign Task” SOP.
5. Complete all necessary notes in CMS. Refer to SOP: Inputting Notes into CMS

Related References and Documents:

SOP [Retrieving Contract Records 20230104.pdf](#)

SOP Inputting Notes into CMS CS

SOP Assigning a Task

Purpose

This SOP is intended to outline how to key and authorize a tow invoice.

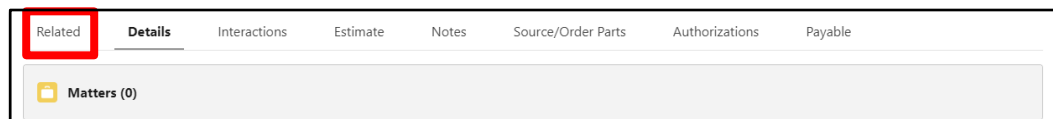
Teams Impacted

- All Departments

Procedure

1. To search for a contract holder, refer to Contract Holder Search Salesforce_CS_20220702.pdf SOP for assistance.
2. Click on the **[Related]** tab.

a.



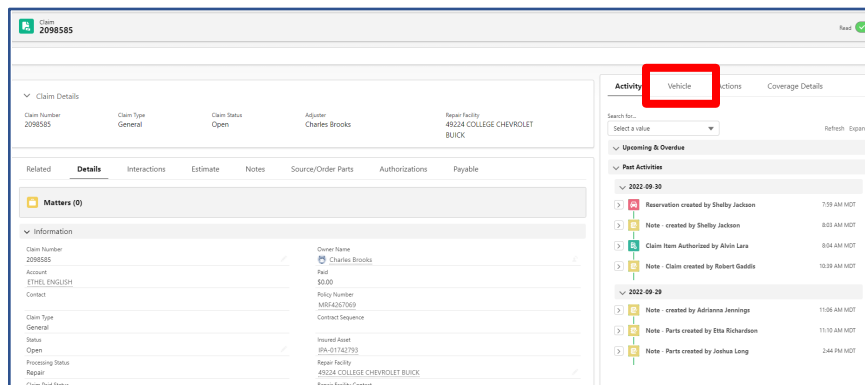
- b. Scroll down to “Documents” to make sure we have the Tow receipt.

Documents (2)			
Name	Document Type	Report Type	Created By
D-M.SRB.20.PTG.0000.RS.AASL.ABI.00.v01.M...			Michael Woodbury
VIN Audit Report	VinAudit	Report	Christian Drennan
View All			

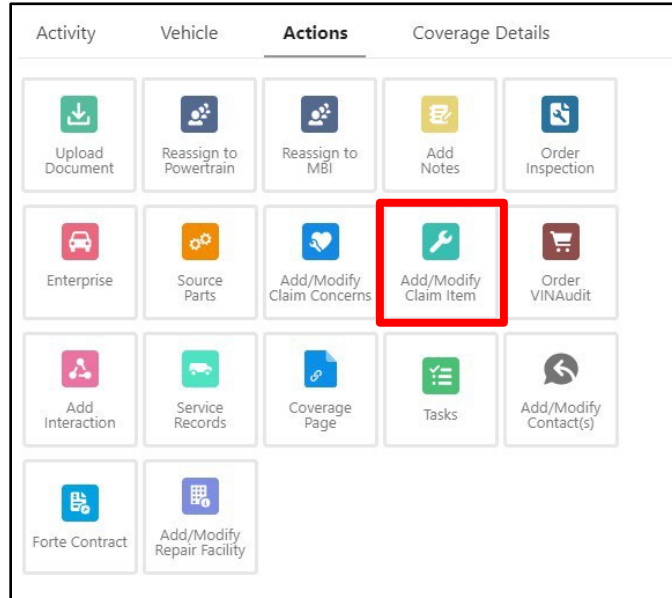
- c. If we do not have the Tow receipt, please refer to the “Checking with Records Team for Invoice and Records” SOP in the Knowledge Base.

3. Click on the **[Actions]** tab.

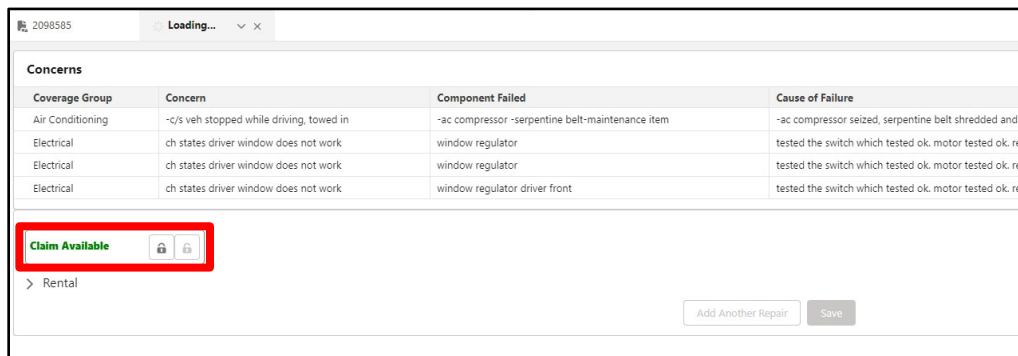
a.



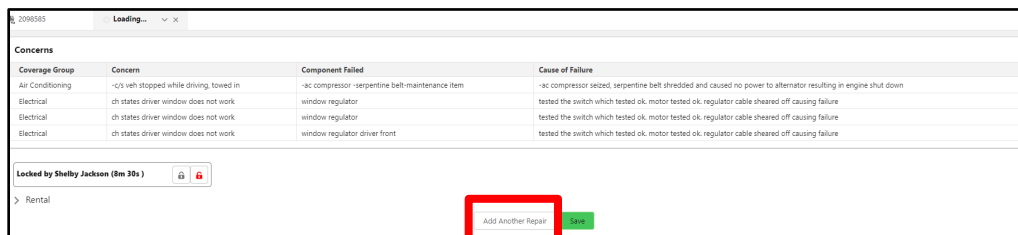
b. Click on **[Add/Modify Claim Item]**.



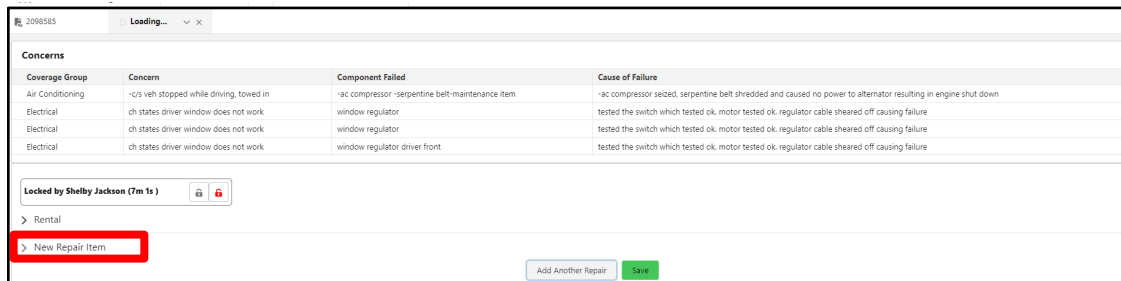
c. Click the **[Lock]** to lock the claim.



d. Click **[Add Another Repair]**.



- e. Click on the drop-down arrow next to “New Repair Item”.



Coverage Group	Concern	Component Failed	Cause of Failure
Air Conditioning	-c/s veh stopped while driving, towed in	-ac compressor -serpentine belt-maintenance item	-ac compressor seized, serpentine belt shredded and caused no power to alternator resulting in engine shut down
Electrical	ch states driver window does not work	window regulator	tested the switch which tested ok, motor tested ok, regulator cable sheared off causing failure
Electrical	ch states driver window does not work	window regulator	tested the switch which tested ok, motor tested ok, regulator cable sheared off causing failure
Electrical	ch states driver window does not work	window regulator driver front	tested the switch which tested ok, motor tested ok, regulator cable sheared off causing failure

Locked by Shelby Jackson (7m 1s)

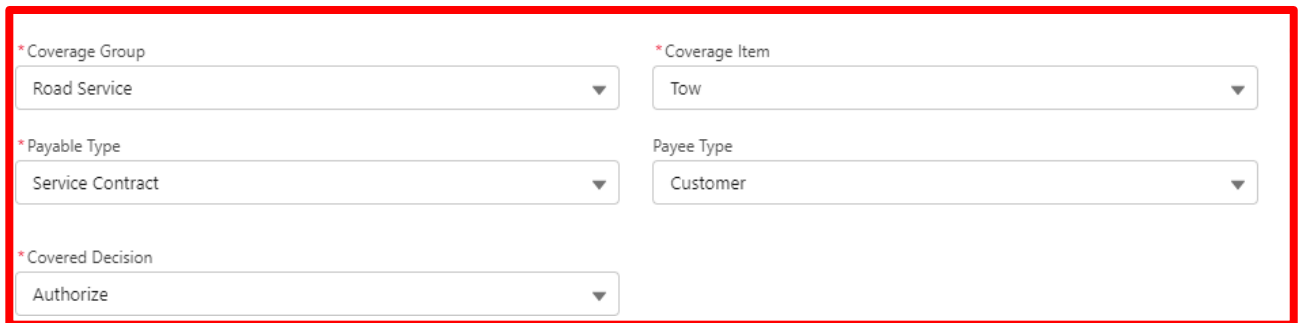
> Rental

New Repair Item

Add Another Repair Save

- f. You will need to fill out the required areas:
- Coverage Group, input Road Service
 - Coverage Type, input Tow
 - Payable Type, input Service Contract
 - Payee Type, input Customer
 - Covered Decision, input Authorize

▼ Tow



* Coverage Group: Road Service

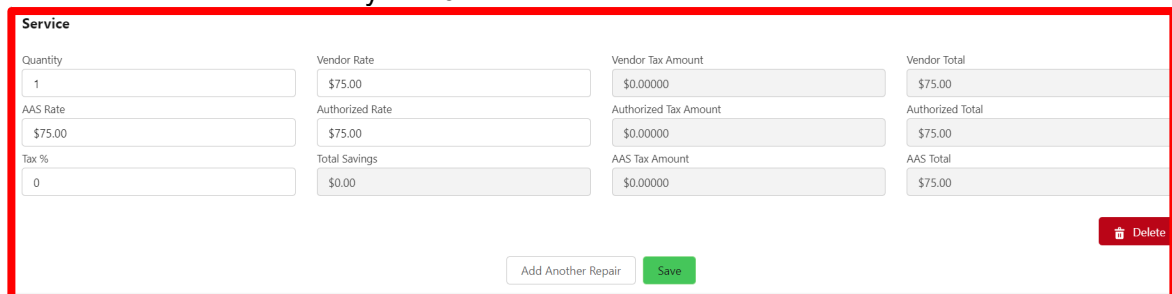
* Coverage Item: Tow

* Payable Type: Service Contract

Payee Type: Customer

* Covered Decision: Authorize

- g. In the Service section, you will enter:
- 1 for the quantity
 - Dollar amount for total tow reimbursement for vendor rate, AAS rate, authorized rate.
 - The vendor rate is the total amount on the supplied invoice
 - The AAS rate is the amount of the invoice not to exceed the per occurrence tow reimbursement rate.
 - Validate the per occurrence rate using the contract holder's policy terms.
 - Tax will always be 0.



Quantity	Vendor Rate	Vendor Tax Amount	Vendor Total
1	\$75.00	\$0.00000	\$75.00

AAS Rate	Authorized Rate	Authorized Tax Amount	Authorized Total
\$75.00	\$75.00	\$0.00000	\$75.00

Tax %	Total Savings	AAS Tax Amount	AAS Total
0	\$0.00	\$0.00000	\$75.00

Delete

Add Another Repair Save

h. Click **[Save]**.

Service
Quantity
1
AAS Rate
\$75.00
Tax %
0

Vendor Rate
\$75.00
Authorized Rate
\$75.00
Total Savings
\$0.00

Vendor Tax Amount
\$0.00000
Authorized Tax Amount
\$0.00000
AAS Tax Amount
\$0.00000

Vendor Total
\$75.00
Authorized Total
\$75.00
AAS Total
\$75.00

Add Another Rep

Save

Delete

4. Once you click save, send the claim number to your Team Lead via Microsoft Teams for Authorization.
5. Once the claim is authorized, you will “Task” payments to release the reimbursement.
 - a. Please visit the Knowledge Base for the SOP on “How to Assign a Task.”
6. Complete all necessary notes in CMS. Refer to Notating in CMS 20220301.

Approval & Revision

Date Created 9/20/2022	Created By Shelby Jackson	Date Approved 10/26/2022	Approved By Felicia Mainiero / Brian Coleman	
Date Revised 08/02/2023	Revised by Melissa Bryant	Revision Description [Added Fast Track Article]	Date Approved 08/02/2023	Approved By Amanda Wiseman
Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]	Approved By [Approver's Name]
Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]	Approved By [Approver's Name]
Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]	Approved By [Approver's Name]